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Yearbook 2016

The Quality of the Media

Digest: main findings

Schweiz Suisse Svizzera

The *Jahrbuch Qualität der Medien* («Yearbook The Quality of the Media») and the accompanying e-journals *Studien* and *Reflexionen* are published in German by Schwabe Publishers Basel. The Yearbook and the e-journals can be ordered on www.schwabeverlag.ch, the Yearbook is also available in any bookshop.

Excerpts from the Yearbook and the e-journals are accessible on www.foeg.uzh.ch.

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Digest: main findings 2016

The Quality of the Media – Switzerland

The quality of the media is our ongoing research topic, and we publish our results in autumn each year as the «Yearbook The Quality of the Media» (*Jahrbuch Qualität der Medien* [JQM]) and periodically throughout the year as «Quality of the Media Studies» (*Studien Qualität der Medien* [SQM]). The Yearbook analyses and documents on an annual basis the main events and developments within the Swiss media system. It also contains detailed analyses of the use and funding of the general interest information media with the greatest reach from the three major linguistic regions in Switzerland, as well as analyses of the quality of their news coverage. The Yearbook includes information media from the press, radio and television as well as from the new online information offerings and platforms. The in-depth «Quality of the Media Studies» (SQM) take a deeper look at selected topics from the fields of media, politics, the economy and society. 2016 saw the publication of two studies: «Medienvertrauen – eine vergleichende Perspektive» [Media trust – a comparative perspective] and «Wie Mediennutzer in die Welt schauen: Die Newsrepertoires der Schweizerinnen und Schweizer und ihre Themenagenden» [How media users look at the world: news repertoires of the Swiss and their perception of topics].

This brochure contains the main findings from the 2016 Yearbook and those of the in-depth studies. We work with content analyses and surveys, gathering our own data and evaluating secondary data on characteristics of the media sector. This year, we are highlighting the following five main findings:

- I. *Public service broadcasting increases trust in the media system:* Frequent users of news from public service broadcasting develop greater trust in the media system. This finding applies across the board internationally and to Switzerland too. When trust in the media system is high, users are also more willing to pay for news and accept advertising (e.g. in online media). In Switzerland, trust in the media system is relatively high compared with other countries. Heavy use of public service broadcasting helps explain this finding.
- II. *Subscription papers and public service broadcasting with more diverse coverage:* In Switzerland, the information offerings from subscription papers and public service broadcasting offer the most diverse news coverage out of all media types. This is one result from our newly devised approach to measuring diversity. And even more so than online news sites, printed subscription papers offer a particularly balanced mix of news from the worlds of politics, the economy and culture. The main newscasts of the public broadcaster SRG SSR are characterised by reflection on the political landscape from very many different viewpoints; they also place particular focus on ensuring that reports about the economy pick up on economic phenomena and developments with systemic relevance.
- III. *The general public also shares an understanding of quality shaped by democratic theory.* The high quality of subscription papers and public service broadcasting, as observed in the content analysis, is also confirmed by the media users surveyed. The understanding of quality shaped by democratic principles that underpins our analyses is therefore shared by the general public. This shared understanding also applies to young adults as a group, who, according to our in-depth study, are more likely to use information media of lower quality than other age groups. This means that users who consume news of lower quality are aware of this.
- IV. *The «news-deprived» represent the single largest group of media users:* Although media users share an understanding of quality shaped by democratic principles, ever fewer people are using a broad range of high-quality media. The proportion of the general public classed as «news-deprived» has increased from 21 % (2009) to 31 % (2016) in recent years. The «news-deprived» now represent the largest single group of media users. Young adults and especially young women are particularly pre-

dominant here. These are below-average users of news, and when they do use news, it tends to come from commuter papers or free online offerings and news via social media.

- V. *Social media are among the main sources of information for young adults:* Already, some 47% of those surveyed in Switzerland state that they look to social media for information at least once a week. For 22% of those aged 18 to 24, social media – with *Facebook* leading the way – are already the main source of information. A mere 11% of young adults consider television to be their main source of news. With the growing significance of social media in terms of news consumption, the traditional media providers have an opportunity to increase their reach and secure new, paying subscribers, but also face losing a degree of control regarding how their content is subsequently reused. The media brands of traditional news providers are also somewhat diluted across social networks. The «Reuters Digital News Report» survey of selected countries suggests that respondents who consume a news outlet via social media tend to be only partially aware of the media brand, which of course is different for people who access an outlet's news site directly.

I. Use of public service broadcasting increases trust in the media system

In a democratic society, it is important that people can trust the media. Also – as indicated by data from a broad comparison of various countries – trust in the media system is a key factor in users' willingness to even consider paying for high-quality news journalism. So it is important, for various reasons, to ask which factors increase trust in the media system. The comparison of various countries, based on the international «Reuters Digital News Report» (which the fög was involved in as the Swiss national partner), clearly shows that use of public service broadcasting promotes trust in the media system.

Full analysis: Mario Schranz / Jörg Schneider / Mark Eisenegger: Medienvertrauen – eine vergleichende Perspektive. SQM 1/2016.

Lead question: What factors explain trust in a media system?

Method: Survey

Key data: Some 13 countries were selected for the in-depth study entitled «Medienvertrauen – eine vergleichende Perspektive» (Media trust – a comparative perspective), and these can be classified into four media system types based on the current literature: Switzerland, together with neighbouring countries Germany and Austria and also the United Kingdom, belongs to the «Central» system type, which is particularly associated with a strong public service broadcaster. Norway, Sweden and Denmark represent the «Northern» type, which is typified by a strong public service broadcaster and, among other things, a greater tendency to subsidise the press. Examples of the «Southern» type are Italy, Spain and France, where both the public service broadcasting and the press in general play a less important role. Countries with a decidedly liberal media system are referred to as the «Western» type and include the USA, Ireland and Belgium.

Across all 13 countries surveyed, there are clearly distinguishable significant factors for a user's trust in the media system. These factors are the results of a regression analysis where we systematically investigated the influence of various factors on trust in the media system (see diagram 1). Foremost among these factors is the context, i.e. the four media system types and the «Switzerland effect». At an individual level, the analysis shows that socio-demographic variables such as age and gender play just as important a role as a person's political persuasions. What ultimately emerges is that actual media use (general use, main sources in terms of offline use, main sources in terms of online use) shows a close correlation with trust in the media.

The media system as context. – An important factor is the media system itself, because the differences between countries are considerable. In Switzerland, compared with many other countries, trust in the media system remains high. 50% of those surveyed state that they trust the news on offer. This sees Switzerland ranked fifth in our comparative study of 13 countries behind Belgium, Germany, Norway and Denmark. At the same time, 39% of the Swiss people surveyed agree with the statement that Swiss media are «mostly independent of political interests» – while 35% consider the media to be «mostly independent of economic interests». Citizens of Switzerland have a significantly higher level of trust in the media, particularly compared with

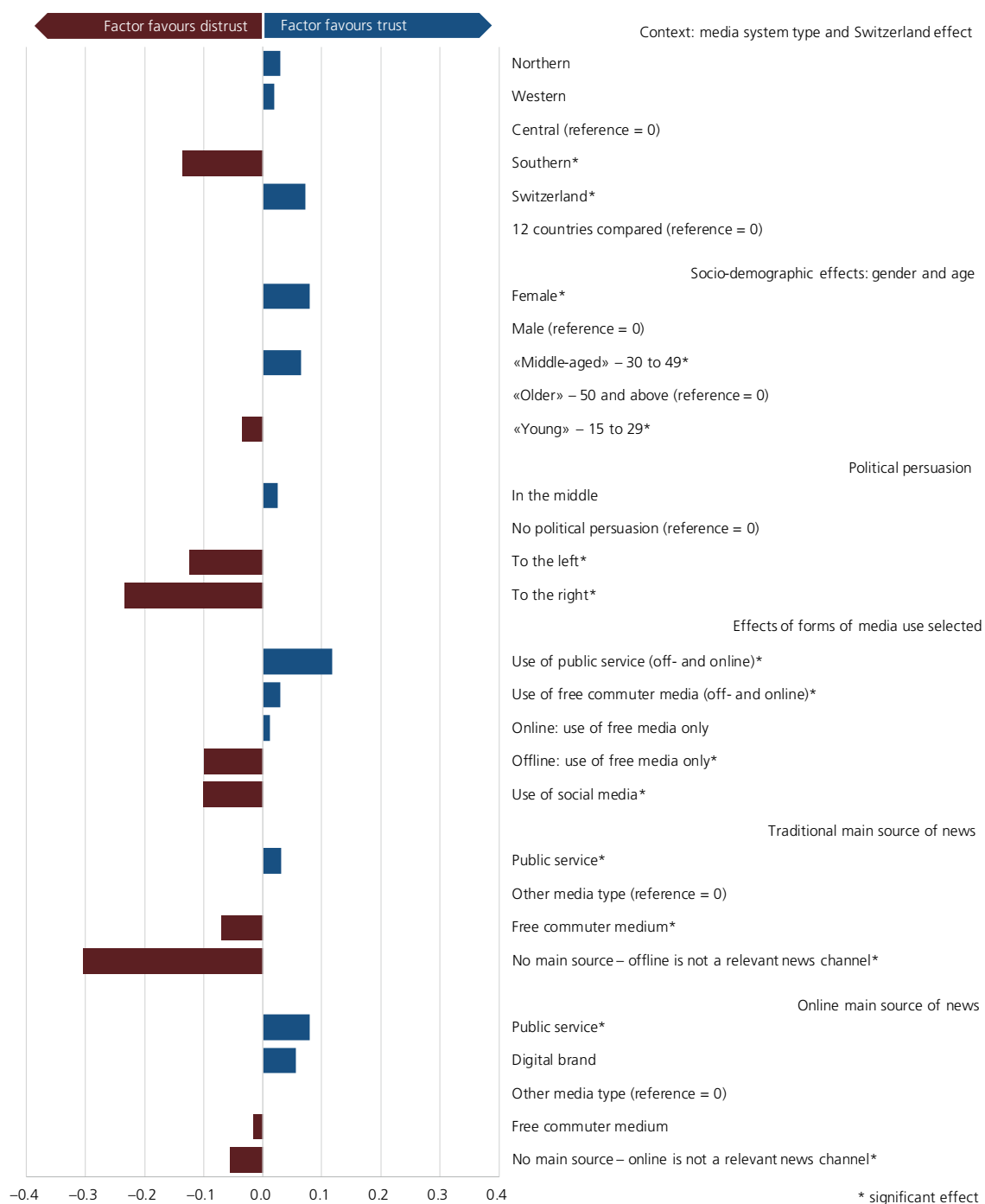


Diagram 1: Factors promoting and undermining trust in the media system

The diagram shows the B regression coefficients from a linear regression analysis in relation to the target variable of trust in the media system. Trust in the media system takes the form of an index consisting of five elements of trust: trust in news, media organisations, journalists, and both the political and financial independence of the media. Significant effects are marked with an * ($p < 0.05$) (source: Reuters Digital News Report 2016; data for 13 countries used for this comparison $n = 20,811$).

Interpretation example: Trust in the media system is promoted where the traditional main source of news is the public service provider. Where commuter papers are the main source, however, the level of trust declines. Trust is particularly likely to diminish and distrust to increase where those surveyed no longer have any traditional main source of news. Where this is the case, the trust index decreases by around 0.3 points on a scale from 1 to 5.

southern European countries. Another possible interpretation of this would be that the media systems of the Northern, Western and Central (including Switzerland) types create better framework conditions for promoting trust in the media. In the countries of southern Europe, where the political scene is more polarised, distrust of the respective media systems is greatest in relative terms. Consistent with this is the fact that trust is also heavily dependent on the political persuasions of those surveyed. The closer those surveyed feel to the margins politically and the more they sympathise with parties at the ends of the spectrum, the greater their distrust. Those on the right, to a greater degree than those on the left, tend to distrust the news (and those who produce it) and be sceptical of the political and financial independence of the media.

Socio-demographic factors: gender and age. – Women express greater trust in the media system than men. While the younger the person surveyed, the greater the distrust. But there is no linear relationship between increasing age and levels of trust. The middle-aged (between 30 and 49) express significantly greater trust in the media system. Among the oldest age group (50 and over), trust starts to decline again.

Individual media use. – What appears to be crucial, however, to trust in the media system is how an individual person uses media. This becomes immediately clear when people are asked which news media they used «in the past week». Use of public service broadcasting (both offline and online) has a positive impact on trust in the media system across all countries. Commuter papers also contribute, to a limited degree, towards trust in the media system, but only if used in combination with other information media (e.g. subscription papers, public service broadcasting). Trust in the media system suffers when free printed commuter media are the only source of information. The use of social media as a source of news also has a clearly negative influence on trust in the media system. One possible reason for this is that people using social media for news tend to perceive the world from a kind of filter bubble. Within these bubbles, relationships and connections are only reinforced with one's own «friends» and therefore one's own reference group. This includes placing one's trust, first and foremost, in the sources of opinions common to this reference

group. By contrast, the news and producers of news outside of this bubble are more frequently treated with distrust.

For a more complete picture of how media use influences trust in the media system, it is helpful to look not just at which media people used «in the past week», but also which media are their main source of news in terms of both traditional media and the online world. Here too, the findings are clear: once again, using public service broadcasting as the main source of news increases trust in the media system significantly. With its mostly diverse, balanced and therefore non-partisan offer of information programmes, public service broadcasters increase trust in the media system and thereby favour social integration. Conversely, a negative influence on trust in the media system can be observed where users cannot or choose not to name any main source of news. Where traditional media are no longer relevant as news media for those surveyed, distrust of the media system grows accordingly. Similarly, commuter papers, when used as the main source of news, also lead to less trust in the media system. The more low-quality free offerings establish themselves as the core and exclusive source of news, i.e. users of free media do not use a broad mix of media, the less trust there is in the media system.

Effects of trust in the media system. – Trust in the media system is not just important in terms of which media are used and how often, but also whether users generally value professional information-based journalism and are willing to pay for this media content and thereby help fund journalism.

Impact on interest in news. – The results provide a clear picture: trust in the media system promotes a basic interest in news (see diagram 2). Even with social media use, which otherwise tends to be associated with distrust of the media, the findings, at least for certain groups of users, are positive. There is a growing willingness – among those users who, in addition to social media, also use other sources for news purposes and place higher trust in the media system – to follow media organisations and journalists on social media (e.g. by liking their pages on *Facebook*) instead of, for example, following parties and politicians. In this respect, such users engage with media and their brands on social media and place greater emphasis on journalistic output than partisan information.

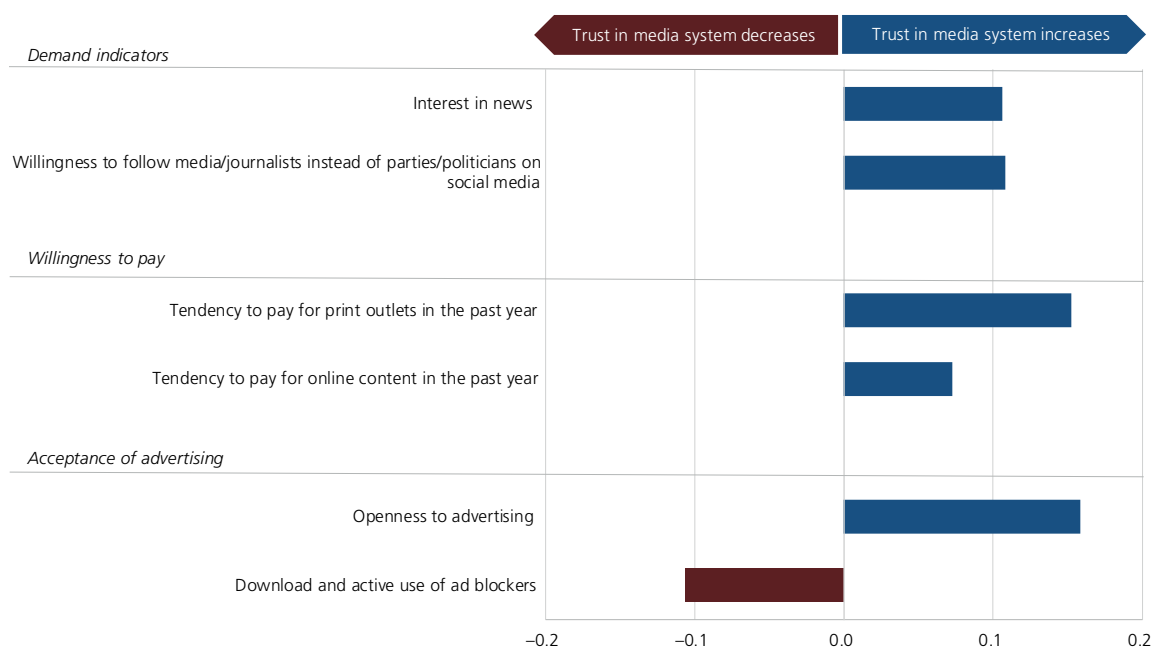


Diagram 2: Effects of trust in the media system

The diagram shows the effects of trust in the media system on target variables relevant to economic considerations involving the media. The significant Pearson correlation coefficients ($p < 0.05$) depicted are a measure of the effects of trust in the media system (source: Reuters Digital News Report 2016; data for 13 countries used for this comparison $n = 20,811$).

Interpretation example: There is a correlation, as reflected in an extremely significant value of 0.16, between trust in the media system and openness to advertising, i.e. the greater media users' trust in the media system, the more open they are to advertising.

Impact on willingness to pay. – In addition to this basic demand for news, trust in the media system is also closely associated with willingness to pay for news. Those persons surveyed with greater trust in the media system show a greater willingness to pay, i.e. they tended to pay for printed publications and also for news content on online platforms during the past year. Moreover, users with a high level of trust in the media system are also more willing to accept advertising. This is shown by the fact that those surveyed admit to being more open to advertising. They feel less distracted by advertising messages and accept advertising as a trade-off for free news. In addition, those with a high level of trust in the media system use significantly fewer ad blockers, i.e. software programs designed to stop on-line advertisements being displayed.

Trust in the media system is important therefore when it comes to whether and how much people are willing to pay for news. At the same time, it is clear that even a

high level of trust in the media, as can be observed in Switzerland, is not enough to address the great funding difficulties that journalism currently faces. Overcoming the prevailing free culture will be no easy feat: more than half of Swiss media consumers currently pay nothing for newspapers any more. The willingness to pay for online news is even lower. Just 10% of those surveyed state that they have paid for digital news during the past year. Overall, the results from the comparison of the various countries refute the assertion that a low willingness to pay can be attributed to public service broadcasting competing with the news sites of private press providers via its extensive free offerings. What can be seen, however, is that a media system where the public service broadcasting is widely used will see trust in the media system increase. This in turn increases the basic demand for news journalism and also has a positive impact on both users' willingness to pay and willingness to accept advertising in media offerings.

II. Subscription papers and public service broadcasting with most diverse news coverage

Not only do news users of public service broadcasting have greater trust in the media system, they are also provided with a very wide diversity of information. The results of the quality scores show that no other media type achieves a higher score for the diversity quality dimension than the main news programmes on public radio of the broadcaster SRG SSR (a score of 8.6). Next with scores of 8.4 and 8.2 respectively come «SRG SSR online» and «public television». With both the main news programmes of SRG SSR and subscription papers offline and online (based on scores of 7.1 and 6.6 respectively), events are therefore explained in news coverage from a particularly wide range of viewpoints. Diversity is a decisive quality criterion, since this is the only way of offering the public a comprehensive mix of topics from various perspectives. Diversity of content and diversity in geographical terms help people form opinions and are extremely valuable in a country with a system of direct democracy like Switzerland.

Full analysis: Chapter III and the chapter on «Methodology» in the «Yearbook The Quality of the Media» (2016).

Lead question: How diverse is the reporting from the various media types?

Method: Content analysis

Key data: Data gathering is performed at the fög / University of Zurich. The random sample from 2015 takes in 25,389 stories from 64 news outlets and information programmes from German-speaking, French-speaking and Italian-speaking Switzerland.

Diversity, as it is understood here in the context of academic research, is partly based on the normative idea that the social spheres of politics, the economy and culture (including religion, art and science), which are particularly important to both society and democracy, should be given particularly strong and diverse coverage. But we also acknowledge that soft news or human interest stories and sport represent a legitimate means of attracting the public's attention. Adding this kind of material to the mix presents no real problems up to a certain degree and is not judged negatively as regards the diversity quality dimension applied here – providing, however, that certain critical thresholds are

not exceeded and the other topical areas relevant to society are not too heavily distorted by this (see the chapter on «Methodology» in the «Yearbook The Quality of the Media» [2016]).

Are the media types managing to provide a diverse mix of content from various areas of society, or is the focus rather restricted? If we look at the diversity profiles, we can see which specific areas the media focus upon. As such, diagram 3 does not illustrate the whole range of topics dealt with for each media type, but only those topical areas afforded particular emphasis, i.e. those which come up more often than average.

Clearly, subscription papers and news programmes from public service broadcasting make the greatest contribution towards diversity of content in the Swiss media arena. Generally speaking, printed editions from the subscription press offer a balanced mix of news from the worlds of politics, the economy and culture. A peculiar characteristic of this type is the significant focus on stories from the areas of religion, science, the media and art. Although there are big differences between individual outlets: while, say, the *Neue Luzerner Zeitung* or *Le Nouvelliste* offer less diversity, the national outlets NZZ and *Le Temps* and also some outlets with a more regional flavour like *24 heures* demonstrate a particularly high level of diversity. The spread of topics dealt with is rather more limited for news sites run by the subscription press; these news sites tend to be strongly associated with political reporting – where topics are put into context – combined with economic news regarding companies and individual people.

Public radio and television and their online offerings owe their considerable diversity to the way they reflect on the political landscape from many different viewpoints and place additional focus on economic reporting that picks up on economic phenomena and developments of systemic relevance.

Conversely, the tabloids and Switzerland's most widely used news formats, i.e. the commuter papers (online and offline), focus very narrowly on sport and human interest stories, i.e. they show limited diversity. In particular, there are evidently «blind spots» here in terms of highly relevant political and economic reporting that provides a degree of context. One noticeable aspect is the disproportionately high emphasis the printed commuter papers and the news sites run by the tabloid press place on reports involving service-ori-

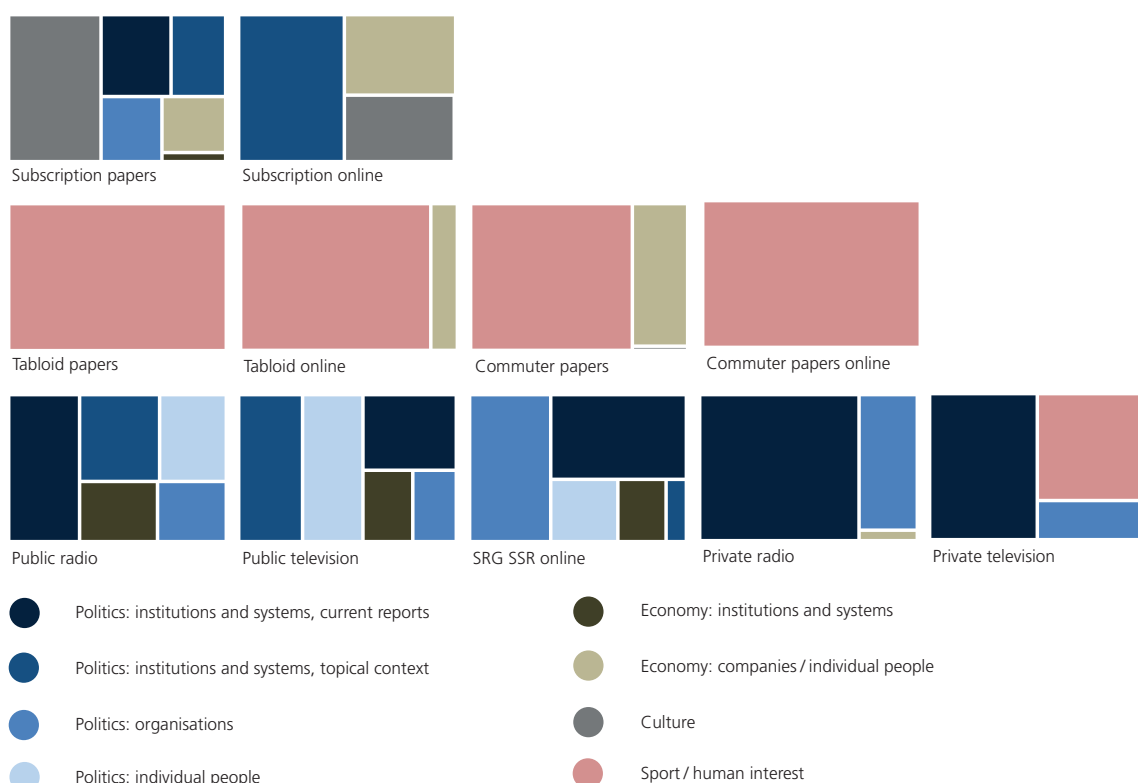


Diagram 3: Areas of focus (in terms of content) and diversity of media types

The tile-like graphics show the areas of focus, in terms of content, to which the various media types devote more attention than average. The surface areas of the tiles represent positive standardised residuals in proportional terms. Positive standardised residuals are not directly proportional values, but indicate the extent to which the proportion for the particular area of focus exceeds the average proportion across all the various outlets. Negative standardised residuals, i.e. below-average proportional values, are not shown. The areas of focus shown correspond to the categories used to measure diversity of content. What is represented therefore shows how far the media types contribute to diversity of content within the media arena. Data set used: all stories included in the quality analysis that were sourced on the basis of random samples throughout 2015 ($n = 25,389$).

Interpretation example: Subscription papers contribute to diversity insofar as they devote greater than average coverage to six of the eight areas of focus. The most disproportionately large contribution they make is by focusing on culture. By contrast, tabloid papers only contribute towards human interest and sport. Their coverage of all the other categories (in terms of content) is disproportionately small.

ented companies with an explicit consumer angle (e.g. regarding Apple products or services offered by SBB – the railway operator in Switzerland), as well as on business news focusing on specific people (e.g. «As revealed by Tim Cook at an Apple keynote event» or «Station cleaning in Olten: SBB boss Andreas Meyer helps clean the tracks»).

And although the private radio type places considerable focus, in terms of content, on politics, this mainly takes the form of short reports rather than background pieces providing any context. News on private television features many more human interest topics than

other forms of news broadcasts; and any political reporting, as with private radio, is disproportionately likely to consist of a mere series of dispatch-like reports.

III. Concept of quality derived from democracy theory also shared by the general public

The understanding of quality shaped by democracy theory that underpins this Yearbook is shared by the wider population surveyed and informs how they rate the quality of the media. This confirmation results from a twofold study design, where the quality bench-

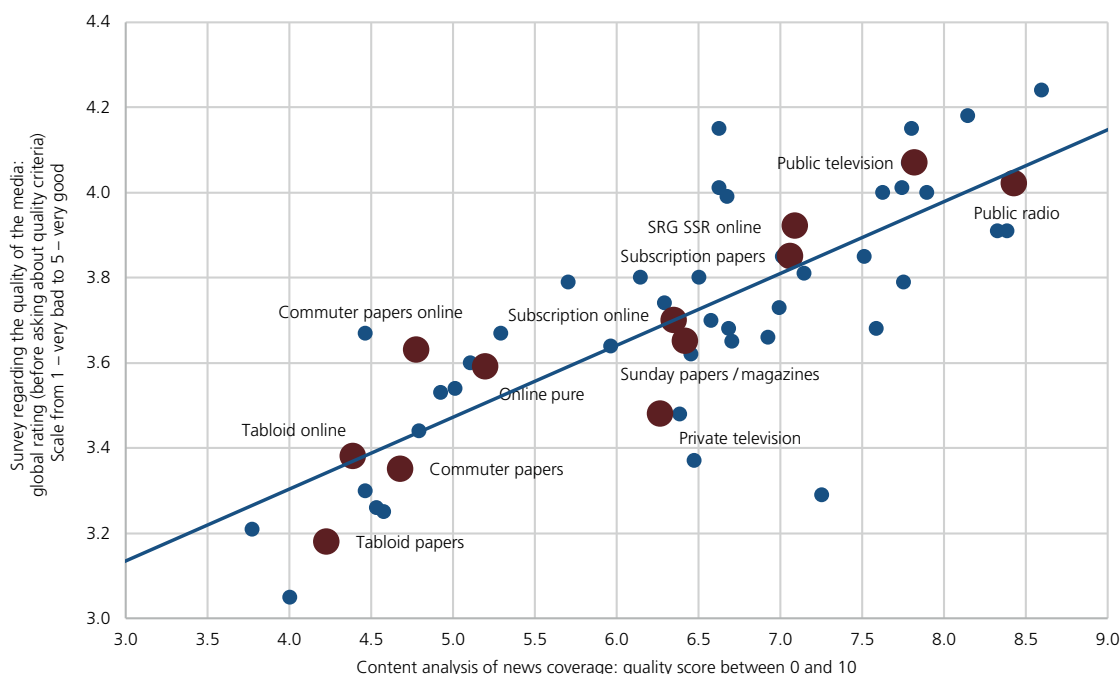


Diagram 4: Correlation between the quality score from the offering analysis and the global rating from the recipients

The diagram shows the results from the content analysis of news coverage on the horizontal axis (scale of 0 to 10) and from the survey of media quality on the vertical axis (scale of 1 to 5). The results for the 43 media outlets (blue dots with no labels) for which data from both the content analysis and the survey is available can be read off accordingly. The 12 media types (red dots with labels) are also shown. The line represents the line of best fit for the point cloud and highlights the strong correlation between the results of the content analysis and the survey ($r = .77$; $p < 0.001$). The line of best fit for the point cloud made up of the 43 media outlets helps identify the outlets and types achieving the better ratings in the survey (above the line) and those performing better in the content analysis (below the line).

Interpretation example: The «tabloid papers» type achieves a quality score of 4.23 in the content analysis. In the survey, it achieves an average rating of 3.18. Since the «tabloid papers» type lies below the line, the score recorded for the offering is better than the quality rating delivered by the people surveyed.

Data set used: The type-specific results of the content analysis, as represented here, were only calculated for the 43 media outlets (18,365 stories) for which the recipients (1,613 people surveyed) were also asked to provide quality ratings. These results are slightly different from the results delivered by the total sample of 64 media outlets analysed. The sample of 43 media outlets from just two linguistic regions fares somewhat better, because media with greater reach and correspondingly bigger editorial resources are particularly well represented here. By contrast, the broader sample consisting of 64 media outlets is representative of the media arenas within the three linguistic regions and of the relevant media types.

marks underpinning the content analysis news coverage could be viewed against the public's perception of quality. It would seem therefore that, rather than being something elitist, a quality benchmark that is shaped by democratic principles – as recognised in academic research – is also embedded in the minds of the recipients.

Full analysis: Chapter III and the chapter on «Methodology» in the «Yearbook The Quality of the Media» (2016), as well as the media quality rating (MQR-16): mqr-schweiz.ch.

Lead question: Are there differences between the quality of reporting as determined by the content analysis and the public's perception of quality?

Key data from the content analysis: The random sample from 2015 takes in 18,365 stories from 43 forms of media from German-speaking and French-speaking Switzerland.

Method: Content analysis and survey

Key data from the survey: This involves a project sponsored by the Stifterverein Medienqualität Schweiz. The fög / University of Zurich is an academic partner. An online survey of a representative selection of 1,613 peo-

ple from German-speaking and French-speaking Switzerland was conducted in February and March 2016. Perception of quality was polled for 43 forms of information media, with those surveyed only being asked to assess media outlets which they knew either well or very well.

In diagram 4, the 43 media outlets appear as blue dots without labels, while the media types are shown as red dots with labels. The quality score from the content analysis can be read off the x-axis on a scale of 0 to 10, while the average quality rating from the survey can be read off the y-axis on a scale of 1 to 5. The quality rating shown is a global rating, i.e. the recipients initially only rated the quality in very general terms, before they were asked about specific, individual quality dimensions (e.g. diversity).

As the rather stretched-out point cloud indicates, there is a close correlation between the two quality measurements ($r = 0.77$; $p < 0.001$). Media outlets and media types below the line fare better in the analysis of reporting quality; those above receive better ratings in the public survey. The overall picture makes it clear that media outlets which fare well in the quality analysis of the respective offering are also rated highly by the recipients. The media offerings from SRG SSR and the subscription press receive high ratings. Somewhere in the middle are the online offerings from the subscription press, the Sunday papers and magazines as well as private television. Lower than average quality, as identified in the content analysis and perceived among those surveyed according to their own statements, is associated with the print and online offerings of the tabloid and commuter papers and the online pure player *watson.ch*.

People are thus clearly still thinking along the lines of established quality benchmarks. This is an important finding given the upheaval within the media system and the associated problems in terms of funding journalism. High-quality journalism will still have a foundation to build on in future if the recipients' understanding of quality, as they express it, actually translates into demand for quality journalism and journalists demonstrate their commitment to quality through attractive, quality offerings. So the general public also shares an understanding of quality shaped by democratic theory – an attitude which applies across all age

bands. Another very close correlation, albeit to a lesser degree, emerges among young users up to the age of 29. Given that the young adult age group contains a disproportionately high number of users with little inclination for high-quality media or professional information media, this is rather a comforting finding. This group is also aware of quality as an issue and at least knows that professional information-based journalism is important for society and democracy.

IV. The «news-deprived» represent the single largest group of users

So it seems the Swiss rate the quality of the media based on an understanding of quality shaped by democratic theory. This does not necessarily mean, however, that high-quality information media are also actually used. Nor does it mean that someone only uses either high-quality or low-quality media. We shall refer to the combination of various media used by recipients for news purposes as news repertoires. The news repertoires help reveal recipients' typical patterns of use and how these change. And it is also possible to determine the level of quality that users with a given news repertoire will be receiving.

Full analysis: Jörg Schneider / Mark Eisenegger: *Wie Mediennutzer in die Welt schauen: Die Newsrepertoires der Schweizerinnen und Schweizer und ihre Themenagenden* [How media users look at the world: news repertoires of the Swiss and their perception of topics]. SQM 2/2016; chapter III and the chapter on «Methodology» in the «Yearbook The Quality of the Media» (2016).
Lead question: What level of quality appeals to the users with various news repertoires?

Method: Survey and content analysis

Key data from the content analysis: The random sample from 2015 takes in 25,389 stories from 64 forms of media from German-speaking, French-speaking and Italian-speaking Switzerland.

Key data from the survey: This involves a collaborative project between GfK Switzerland and the fög / University of Zurich. At the start of each year, an online survey is conducted among a representative selection of 3,400 people from German-speaking and French-speaking Switzerland. The survey focuses on media use and the topics and events those surveyed followed particularly closely during the previous year.

From the various possible combinations that make up users' media offerings, some six different types of news repertoires emerge with the help of a cluster analysis. These six different types have the following characteristics, which are briefly outlined below. They are present in varying degrees in Switzerland, with some gaining and others losing ground in recent years (see below).

- «Intensive users», out of all the various repertoire types, invest the most time in information-based media use. Their news repertoire covers a broad range of media types. The repertoire often contains several regional and national daily, weekly and Sunday papers, and there is also extensive use of online media and social media. The main sources of information, however, are the traditional media of television, radio and the daily paper. The news repertoires of «intensive users» also feature to a disproportionately high degree the kinds of media traditionally seen as status symbols among the educated middle class, such as outlets from the national subscription press. This type is associated with a preponderance of men, older users and people with higher diplomas and degrees.
- «Old world tabloid» refers to the news type associated with more intensive than average use of the traditional media of television, radio and local subscription press. The core characteristic of this group, however, is the use of tabloid papers. The older and middle age groups are more heavily represented within this type, although the young are represented too. Higher diplomas or degrees are something of a rarity.
- «Old world & online» refers to the user type associated with more frequent than average use of online media. Use of online sites belonging to classic news media is particularly high, in addition to traditional media, with the latter continuing to be heavily used. The main source of news remains regional subscription papers. This repertoire type is associated with a preponderance of older and highly educated people.
- «Homeland oriented» stands for the user type whose news repertoire has a distinctly regional flavour. The main sources of information are regional subscription papers and the radio. Newer media types such as online offerings, social media and commuter papers are very rarely used. This repertoire type is

clearly dominated by women. The proportion of under 30s is the smallest for this type.

- «Global surfers» are bigger users of international media than any other repertoire type. Online offerings and social media also play a bigger than average role in the way these people access information. It is striking that this type very rarely uses offerings that must be paid for. Virtually the only kind of printed publication they use is the free commuter press. This repertoire type is associated with a preponderance of middle-aged men in work. The proportion of people educated to a high level and with an immigrant background from Western core countries is very high.
- «News-deprived» people devote little time to keeping up with the news. The time they use for information purposes is below the average across all the various media. The information media used are generally available for free. They have the highest proportion for whom social media represent the main source. This repertoire type is dominated by young users under 30 and by women. Higher diplomas or degrees are something of a rarity.

These news repertoires can now be explicitly linked with the quality of news used (see diagram 5). The quality scores for the repertoire types are calculated from two factors: the average quality of news used and the frequency of use. This is because where many information offerings are used on a regular basis, the opportunity to receive relevant, diverse, context-providing and professional news increases accordingly. The more comprehensive the offerings used, the more likely it is that good offerings will feed into the quality score.

The best quality score, based on this measurement, is associated with the «intensive users», who take a lot of time to keep up with the news across various media. As far as the quality score goes here, it does not matter so much if the news diet also includes low-quality media types, because this effect is duly cancelled out by intensive use of high-quality media. In addition to major events of public significance, their personal news agenda also primarily features political, economic and sociocultural topics, as can be seen in the analysis of the news they followed during 2015. The proportion of «intensive users» is 11% and has been declining since 2009 (see diagram 6).

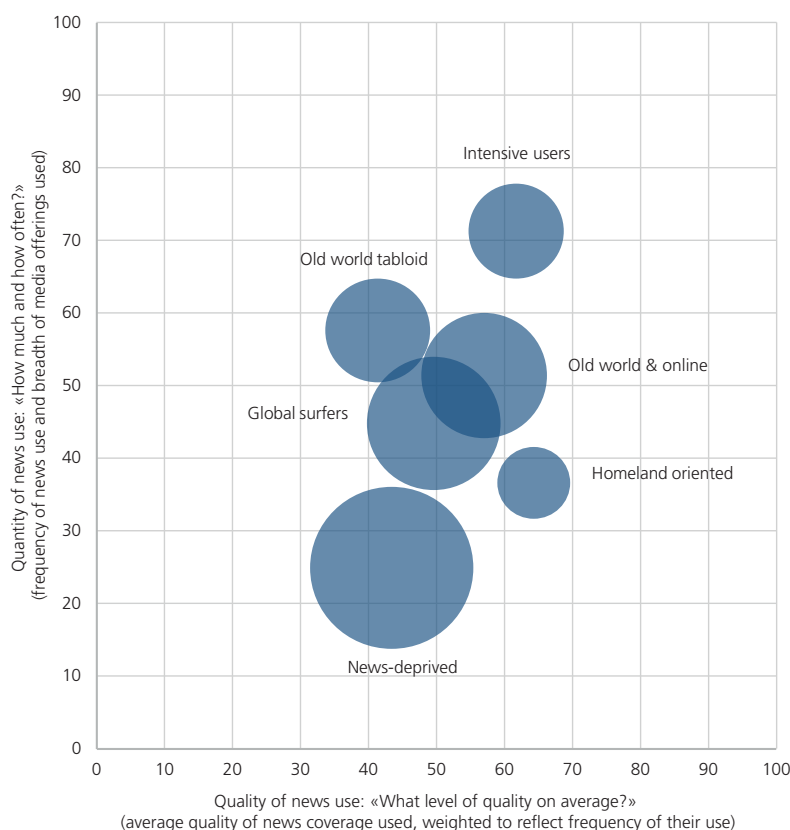


Diagram 5: Repertoire types – quality of news repertoires and quantity of news use (proportions reflected in bubble size)

The diagram shows the average quality of the media used within the individual news repertoires (horizontal axis) and the average quantity of news use (vertical axis) for the six repertoire types. The scales range from 0 to 100. The proportion of the resident Swiss population associated with the individual repertoire types is reflected in the size of the respective bubbles.

Interpretation example: The «intensive users» repertoire type has a score of 61.7 for quality and a score of 71.3 for quantity. Its proportion of the resident population is 11%.

The polar opposite of the «intensive users», who are so well catered for, would be the «news-deprived». They have the worst quality score of all the repertoire types. The «news-deprived» are really missing out on news, in terms of both quality and quantity. As a result of going short in this area, the «news-deprived» tend to perceive catastrophes, crises and scandals as the most important events of the previous year. At their own admission, these people barely follow political topics and particularly the day-to-day political scene in Switzerland. Their view of the world is coloured by threatening scenarios, and – when combined with a lack of interest in any political context – this most likely leaves the «news-deprived» susceptible to populist politics based on fear and offering apparently simple solutions. The proportion associated with this news repertoire has risen since 2009 by a significant 10 percentage points to its current level of 31%. As the analysis of trust in the media system (see point I) proves, recipients who

say that they no longer use any traditional media are particularly likely to treat the media system with distrust. Combined with the growing proportion of «news-deprived» among the population, it can therefore be assumed that trust in the media system will tend to decline in Switzerland in future too.

The «global surfers» repertoire type also fares relatively badly in terms of its quality score. The topical agendas of the «global surfers» are very dispersed and disparate. There is a noticeable lack of awareness of regional and national topics. This type is showing a withdrawal from the regional and Swiss media arena in favour of a global perspective. These well-educated working people, many of them with an immigrant background from Western core countries, are therefore only marginally engaged in the sociopolitical debates taking place in Switzerland. It is striking just how many of these people tune out of the national public sphere, either through lack of interest or a lack of opportunity

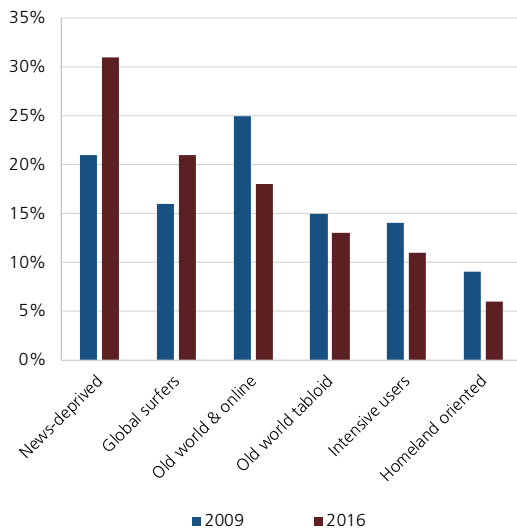


Diagram 6: Repertoire types – change compared with 2009

The diagram shows the proportion of the resident Swiss population associated with the individual repertoire types in 2009 (blue columns) and 2016 (red columns).

Interpretation example: The proportion of «news-deprived» has risen since 2009 by a significant 10 percentage points to its current level of 31 %.

to participate in politics. The proportion of «global surfers» has been increasing continuously since 2009 and now stands at 21 %.

The proportion of repertoire types from the «old media world», namely «old world & online», «old world tabloid» and «homeland oriented», has been shrinking since 2009. Collectively, these types are down by 12 percentage points. As before, their news repertoires mainly continue to be characterised by traditional media. However, the frequency with which they use traditional media, particularly the classic daily paper, is decreasing. This decline in the quantity of news use is not (yet) being compensated for by use of high-quality information offerings from the «new media world». And this is why the quality scores, particularly those for the «old world tabloid» and «homeland oriented» types, are relatively low.

V. Social media are among the main news sources for young adults

More and more people are now stating that they use digital channels such as news sites, online portals and particularly social media for the purposes of news

consumption. The «Reuters Digital News Report» calculates the media use of the Swiss population with the help of a representative online survey (see box). A clear picture emerges from the figures. Almost half of those surveyed (47 %) already state that they look to social networks for news at least once a week.

Full analysis: Chapter II and chapter VI in the «Yearbook The Quality of the Media» (2016).

Lead question: How significant are social media in terms of news consumption?

Method: Survey

Key data: The data comes from the «Reuters Digital News Report». The global report contains survey data for 26 countries (over 50,000 interviews). The fög / University of Zurich is the Swiss partner organisation. In Switzerland, some 2,002 Internet users from the German-speaking and French-speaking regions were surveyed. Random samples representative of Internet users aged 18 and over were taken on the basis of online panels.

The use of social media for information purposes is largely dependent on a person's age. Young users in particular look to social media for information (see diagram 7). 65 % of those aged 18 to 24 surveyed in Switzerland state that they used social media for news purposes «in the past week». Almost a quarter of young adults (22 %) rely on social networks as their main source of information. The importance of social networks declines as users get older. All the same, social media are also the main source of news for as many as 4 % of those aged 55 and over, while 38 % of this older group of users state that they have (also) used this channel for news «in the past week».

The young generation has grown up with the new channels for dissemination of information. Compared with traditional forms, it can be seen how embedded digital media and social networks are within this age group. News sites, online portals and social media are already the main source of use for around two-thirds (62 %) of those aged 18 to 24. By comparison, television is pretty insignificant as a news channel with a proportion of just 11 %.

The increasing use of media content «on the move» is favouring this trend. In comparison with other countries, mobile media use in Switzerland is very widespread indeed. 81 % of Swiss people surveyed use a

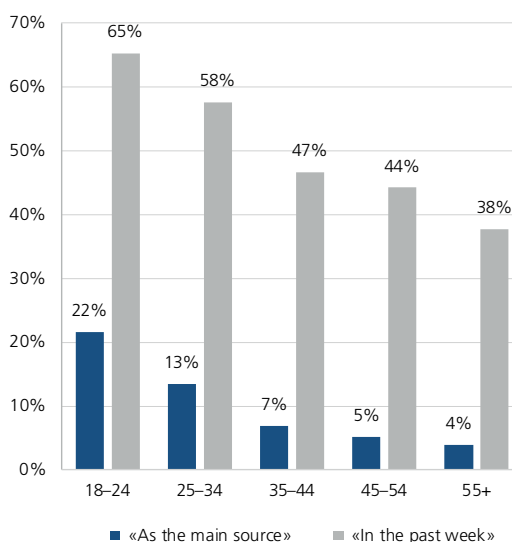


Diagram 7: Significance of social media for the use of news

The diagram shows the significance of social media, in terms of news use, for each age group in Switzerland (source: Reuters Digital News Report, 2016).

Interpretation example: For 22 % of those aged 18 to 24, social media are already the main source of news. 65 % of this age group state that they used social media for news «in the past week».

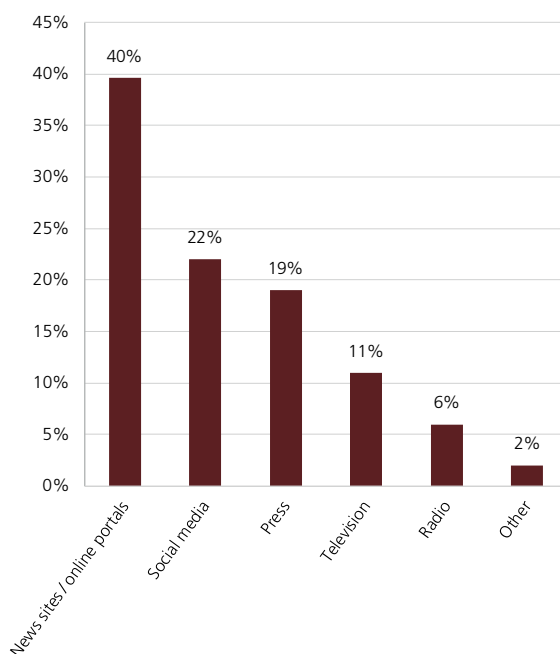


Diagram 8: News use among those aged 18 to 24 broken down by form of media

The diagram shows the significance of the various forms of media, in terms of news consumption in Switzerland, for the youngest age group (source: Reuters Digital News Report, 2016).

Interpretation example: 40 % of those surveyed aged 18 to 24 state that news sites or online portals are their main source in terms of news use.

smartphone, while 61 % (Switzerland is ranked 4th of all 26 countries studied) state that they also use one for news consumption. And for 43 %, their mobile phone is already their main device for using digital news. Here too, the picture is clear: the younger the person surveyed, the greater the importance of mobile devices like smartphones for news consumption.

The increasing significance of social media and mobile media use is now strengthening the position of intermediaries who own relevant and widely used platforms. In order to make their platforms more appealing and fill them with content, the tech giants are increasingly relying on news offerings and cooperating accordingly with media groups or disseminating their content. In terms of use at least, *Facebook* and *Google* (mainly through *Youtube*) are best placed with their offerings: 36 % of those surveyed state that they use *Facebook* for consumption of news (see diagram 9). This explains why the traditional media providers are so keen to become involved with *Facebook* through, say, their own *Facebook* pages or the *Instant Articles* service. And *WhatsApp*, the second most widely used social

media channel for news consumption (19.1 %), also belongs to *Facebook*. Next come two *Google* products, *Youtube* and *Google Plus*, with 19.0 % and 6 % respectively. Time has shown how well these two players are able to profit financially from the information market. According to media managers, *Google* and *Facebook* are also securing nearly 50 % of the digital advertising market in Switzerland. And a look at the user behaviour of news consumers also reveals the tremendous significance of the two providers.

From this perspective, many Swiss media providers believe some involvement with *Facebook* in particular to be an attractive prospect. The appeal is the option of achieving greater reach and accessing new, paying subscribers for traditional information offerings. However, not all information media profit from social media to the same degree (see diagrams 10 and 11).

The *Facebook* pages of SRG SSR and a few subscription papers, including *NZZ* and *24 heures*, the purely online

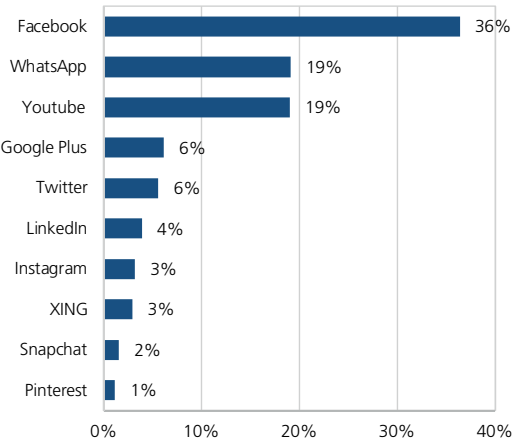


Diagram 9: Most widely used social media channels for news

The diagram shows the significance of the social media channels represented in terms of news consumption in Switzerland (source: Reuters Digital News Report, 2016).

Interpretation example: 36% name Facebook as their main channel for news use in terms of social media.

player *watson.ch* and *Radio Fiume Ticino* are generating a relatively high level of attention. So some media brands are really succeeding in getting large sections of the public to engage with social media. But it is also clear that most providers – including private broadcasters, as well as most subscription papers – are (still) only playing a negligible role on social media. Also, the offerings from the free commuter and tabloid media dominate on Facebook. On the *20 minutes* page, for example, the public respond 20,209 times a day on average in the form of comments, likes or links to a post. This is some ten times more than on the Facebook pages with informational content of RTS, the public broadcaster in French-speaking Switzerland, and almost 50 times more than for the offerings from the subscription paper *L'Express*. It looks like social media are proving to be a promising news channel for providers of commuter and tabloid offerings in particular. And this shift towards social media is therefore helping to perpetuate the triumphal march of the free commuter offerings in Switzerland.

But besides the opportunity to extend reach and thereby attract new potential subscribers, social media are not without risks. These particularly apply to brand strength. The «Reuters Digital News Report» survey of selected countries suggests that respondents who con-

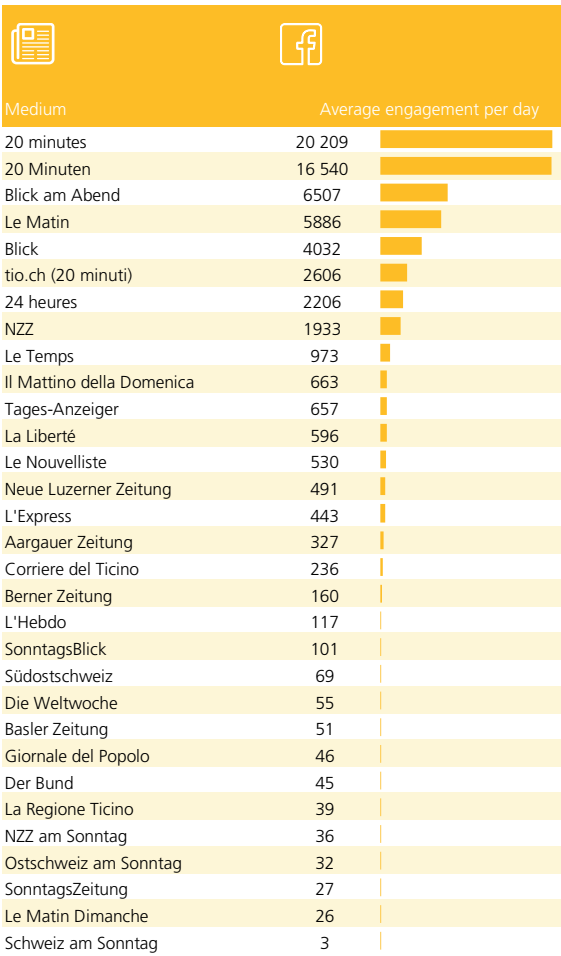


Diagram 10: Press outlets on Facebook – user engagement

The diagram shows which press outlets have Facebook pages with a news flavour and the average daily level of user engagement (shares, likes, comments) (tool: Netvizz, period: January 2015 to March 2016).

Interpretation example: *20 minutes* shows the highest level of user engagement. On average, users «engage» 20,209 times a day in the form of comments, likes or links to a post.

sume a media outlet via social media tend to be only partially aware of the media brand, which of course is different for people who access a brand's news site directly. This is an important finding given that the international survey (see point I) shows that the use of social media is associated with lower levels of trust in the media system and ultimately a lower willingness to pay as well. For journalism, it becomes increasingly decisive that media users on social media are looking beyond tabloid and commuter offerings to take in

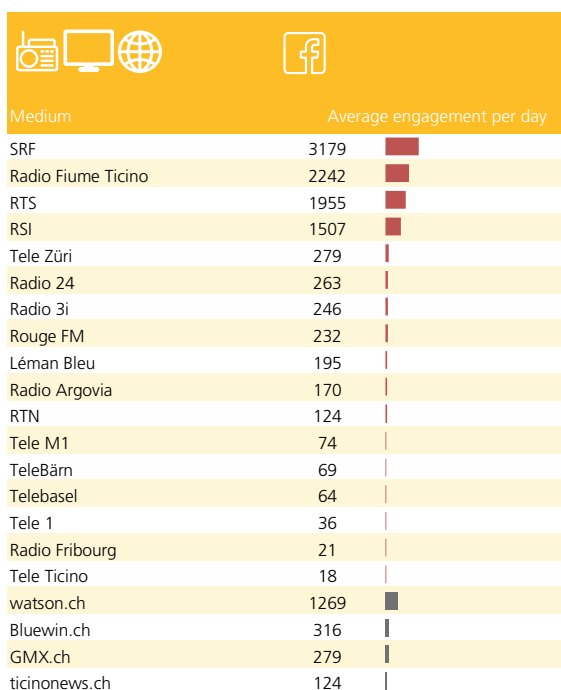


Diagram 11: Broadcast outlets and purely online players on Facebook – user engagement

The diagram shows which broadcast outlets and purely online players have Facebook pages with a news flavour and the average daily level of user engagement (shares, likes, comments) (tool: Netvizz, period: January 2015 to March 2016).

Interpretation example: SRF shows the highest level of user engagement. On average, users «engage» 3,179 times a day in the form of comments, likes or links to a post.

high-quality, well-known offerings as well which are funded via subscriptions, pay-to-read articles online or even fees.

Sources and methods

The analyses underlying the Yearbook and studies are based on both data gathered specifically for those purposes and also secondary data. The various sources are listed here, along with the various methodologies used.

Content analysis

The quality of reporting is measured using a content analysis conducted at the fög – Research Institute for the Public Sphere and Society / University of Zurich. The random sample from 2015 takes in 25,389 stories from 64 forms of Swiss information media from the

three major linguistic regions. The benchmark quality dimensions are relevance, diversity, provision of context and professionalism, which are recorded using indicator variables and rated under a points system. Each media outlet achieves a certain number of points for each quality dimension, which make up a quality score on a scale between «0» (lowest quality) and «10» (highest quality). The average of the quality scores for the four dimensions represents the overall score for the quality of the individual media outlets. Quality measurement has been significantly enhanced this year. For example, the diversity quality dimension is measured in detail using improved indicators. In addition for each of the selected days, all stories from a newspaper edition or a homepage for news sites and all the information programmes on radio and television are now studied. So quality measurement is no longer based on front page and lead stories alone, but on the totality of the respective editions of the information media being studied on selected individual days.

Public surveys

This year for the first time, the data from the «Reuters Digital News Report» has been thoroughly taken into account. The report contains survey data for 26 countries (over 50,000 interviews). And now data is also available for Switzerland. The fög – Research Institute for the Public Sphere and Society / University of Zurich is the Swiss partner organisation for this major study conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. In Switzerland, some 2,000 Internet users were surveyed from the German-speaking and French-speaking regions. Random samples representative of Internet users aged 18 and over were taken on the basis of online panels.

Together with GfK Switzerland, the fög has been conducting a survey of media use since 2009. This involves arranging some 3,400 online interviews per year, which are intended to be representative of the resident population in German-speaking and French-speaking Switzerland. The survey takes place at the start of each year. It asks questions not only about media use, but also about the topics and events those surveyed followed particularly closely during the previous year.

On behalf of the Stifterverein Medienqualität Schweiz, the publisher of the report regarding the media quality rating (MQR-16), a survey was conducted into how

media users perceive the quality of information media. The fög is an academic partner of the MQR-16 project. The analysis is based on a standardised online questionnaire issued to a representative selection of 1,613 people from German-speaking and French-speaking Switzerland in February and March 2016. Perception of quality was polled for 43 media outlets, with those surveyed only being asked to assess media outlets which they know either well or very well.

Characteristics of the media sector

The studies to ascertain the spread and concentration of information media and the media market are based on circulation figures or reach as measured by the media research organisations WEMF, NET-Metrix and Media-pulse.

The data regarding funding of the media comes from the Stiftung Werbestatistik Schweiz, Media Focus and the publication entitled «Medienbudget» from the Verband Schweizer Medien.

The secondary data regarding virality on the *Facebook* pages of media providers was gathered with the help of Netvizz – a data capture and acquisition application from the University of Amsterdam. Additional data regarding the significance of the social media channel for news media (conduit aspect) comes from similar-web.com.

What is the purpose of the Yearbook?

Since it first appeared in 2010, the aim of the Yearbook has been to deepen the discussion regarding the quality of the media and make a contribution towards improving their quality. It will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media content. The Yearbook is based on the long-held view that the quality of democracy depends on the quality of the information communicated to the public by the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

Our quality concept

This Yearbook is underpinned by a normative concept of quality, which takes it as read that information media do an important job for society as part of a properly functioning democracy. From the functions performed by public communication, it is possible to derive four quality dimensions, which are widely embedded in both academic research and journalistic practice. Firstly, the «relevance» dimension is intended to say something about the ratio of hard news to soft news, and also the weight given to stories regarding matters at an institutional level compared with reporting focused on individual people. The «diversity» quality dimension measures whether events are being reported from many different points of view in terms of both content and geography. «Provision of context» is high where current events are framed in relation to longer-term developments and topical implications. Lastly, the «professionalism» quality dimension includes whether reporting is primarily factual (instead of emotional) and whether it is generated by editorial staff themselves, as well as the level of source transparency.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – Research Institute for the Public Sphere and Society / University of Zurich (www.foeg.uzh.ch). Nine academics and seven students are involved in the research and vouch for the quality of the analyses.

Who provides funding and support for the Yearbook?

The Yearbook is funded by the charitable foundation known as the Kurt Imhof Stiftung für Medienqualität (www.kurt-imhof-stiftung.ch) and the University of Zurich. The Board of Trustees comprises the following people: Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Fabio Lo Verso, Dick Marty, Oswald Sigg and Peter Studer.

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Contributions to the Kurt Imhof Stiftung für Medienqualität can be transferred using the following bank details: ZKB Zürich-Oerlikon – Account No.: 1100-1997.531 – Bank Postal Account: 80-151-4, IBAN: CH28 0070 0110 0019 9753 1, Bank Clearing No. 700, SWIFT: ZKBKCHZZ80A.

Contact: fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / University of Zurich, Andreasstrasse 15, CH-8050 Zurich, tel.: +41 44 635 21 11, e-mail: kontakt@foeg.uzh.ch.

Where can I find the Yearbook and the studies?

The Yearbook is available both in printed form (ISBN 978-3-7965-3550-5) and as an e-book (ISBN 978-3-7965-3551-2) from Schwabe Publishers (www.schwabeverlag.ch) and appears each autumn. The studies are published as separate e-publications and are also available from Schwabe Publishers. Around two or three of these studies are published each year.



The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

Studien Qualität der Medien

Schweiz – Suisse – Svizzera

Herausgegeben vom fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich

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Die Studien von 2010 bis 2012 finden sich auch im Jahrbuch Qualität der Medien des jeweiligen Jahrgangs.

Mario Schranz, Jörg Schneider, Mark Eisenegger: **Medienvertrauen – eine vergleichende Perspektive**. SQM 1/2016. Ca. 15 Seiten. PDF E-Book. ISBN 978-3-7965-3652-6. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

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Reflexionen Qualität der Medien

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Peter Studer: **Leisten Presseräte, was sie sollen und wollen? Der Schweizer Presserat im Vergleich mit dem schwedischen, deutschen und britischen Modell**. RQM 1/2014. 23 Seiten. PDF E-Book. ISBN 978-3-7965-3345-7. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

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Schweizer Medien unter der Lupe

Die siebte Ausgabe *Jahrbuch Qualität der Medien* ist von zwei Neuerungen geprägt. Einerseits wurde die Methodik des Qualitätsscorings erheblich erweitert. Das etablierte Konzept wurde um weitere Indikatoren ergänzt, was u.a. eine noch validere Messung der Qualitätsdimension Vielfalt ermöglicht. Die Daten fliessen auch in das Forschungsprojekt Medienqualitätsrating (MQR-16) ein, das die Analyse der Berichterstattungsqualität mit einer Befragung zur Qualitätswahrnehmung des Publikums kombiniert. Mit dieser Befragung konnte empirisch bestätigt werden, dass die Nutzerinnen und Nutzer das dem *Jahrbuch Qualität der Medien* zugrunde liegende normative Qualitätsverständnis teilen. Andererseits ist das fög neu an einer Grossstudie beteiligt, die durch das *Reuters Institute for the Study of Journalism* an der *University of Oxford* durchgeführt wird. Der Bericht *Reuters Digital News Report* erscheint jährlich und enthält Umfragedaten zum Mediennutzungsverhalten für 26 Länder, neu auch für die Schweiz. Die umfassenden

Ergebnisse dieser Studie werden ab diesem Jahr in die Analysen des *Jahrbuchs Qualität der Medien* einbezogen. Sie ermöglichen es beispielsweise, detaillierte Erkenntnisse über die Mediennutzungspräferenzen von jungen Erwachsenen in der Schweiz und im internationalen Vergleich zu gewinnen.

Das *Jahrbuch Qualität der Medien* ist eine informative Quelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, für die Wissenschaft und alle, die sich mit der Entwicklung unserer Medien und ihren Inhalten auseinandersetzen wollen. Es will das Bewusstsein für die Qualität der Medien stärken und die Diskussion über den Wandel unserer medialen Öffentlichkeit anregen. ■

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- Medienvertrauen – eine vergleichende Perspektive
- Wie Mediennutzer in die Welt schauen: Die Newsrepertoires der Schweizerinnen und Schweizer und ihre Themenagenden

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